



Practice Focus

Practice Focus

Series 2 Advanced Training

Session 1 Patient Engagement (Part 1)

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 3. Use the transcript to help complete your Team Activity: **key points are highlighted.**
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Welcome, everyone, to the Advanced Practice Focus series. I'm very excited to be with you here today and to be beginning a very special and new integrated approach that we're going to be taking as well as very interactive if you will. If you can imagine that on this little recording, we're going to make it interactive. I'm proud of your efforts. You've made it through a really incredible and intense series of materials and of focuses on your practice that have led you to where you are today. I strongly encourage you even to go back and revisit them. They are, of course, things that continue again and again, very much like the basics, the foundations, the pillars that make you successful. They do not ever go away, get old, tired or extinct. I would encourage you to do that.

Now, over the next few months, we're going to break down the various ways you engage with your patients. We will look at areas we can improve on so that you can increase your level of effectiveness and getting treatment accepted, cash up front and referrals on the back end.

Here's the bad news- it doesn't matter how good anyone team member is today. It is the team member who is a little off during any given patient experience, new, old or in the middle that is going to derail the success of the visit and the outcome we want. There is only one way to really master that something and that is to do it. You have to do it. Practice makes perfect as the saying goes and it is something we seldom stop to actually take time to do.

Your numbers of course speak for themselves. If you know your average visit value, if you know your average new patient value, first visit, 30 days, 60 days, 90 days, six months, one year later ... If you are tracking your total amount of presented treatment versus what you are getting accepted and scheduled and collected on every single day. You are breaking it down by column, my department, by area, by team member, then you will quickly discover what areas need to be improved on.

Additionally, this all boils down to retention. If you don't keep patients in the practice, then you aren't going to cultivate more treatment over time and you simply aren't going to get every patient to say yes to everything on the very first visit ever.

When it comes to new patients, you need to know how many patients move forward with treatment and how many do not. You need to know, those patients, whether they did treatment or they delayed treatment, moved to hygiene or they did not.

In between those two numbers are all the patients and treatment you are losing. You can assess the same thing every cycle that you are supposed to see patients back in. This requires effort and interest. You actually have to want to know to discover the reality of what's going on.

It is improving your effectiveness on retention, case acceptance and getting patients to care in the first place and want to be in your practice, that's what we're going to be going through this journey over the next several months.

You need to know how many patients move forward from every area of the practice to every step in the process and each individual team members interaction. That's just simply what we have to do.

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Now, the only way to make that possible is to practice through role-playing. Now, it's an over used word that many people think they do but they don't. And many people don't like doing, but they must because you simply cannot go day in and day out, see patient after patient and just pretend that you're saying all the right things. Like I said, the numbers speak for themselves. More treatment leaves (I say this every month) than treatment that stays in. When it comes down to it, this about an education, a communication, a patient's interaction problem.

The good news is, you can always get better. There is no excuse for just patients who don't have money or insurance or all these other things. Many people overcome all of those obstacles every single day. If you're not doing that effectively, it boils down to the patient's desire to do what you tell him.

Through role-playing, we are going to improve. We're going to improve ourselves in every facet of the practice. We're going to begin today with the Practice Focus on patient engagement.

What I would just call: Part 1, being in control and mastering the emotionally engaging phone call and having conversations of discovery with your patients.

Today, we begin simply with the first impression, the first point of contact, the phone call.

Before you think that this is back to basics, which it is, it's important for you to understand you can never get too good at answering the phone. Every team member should practice it because even if you never pick up the phone in the office, you still deal with the same type of questions. You are also absolutely dealing with the repercussions of what is said on the phone by other team members. **It's in everyone's best interest to understand and know this and remember, once again, no person ever walks through the door without first walking through the phone.**

Here's what we're going to do, first, I want you to remember the phone calls about three things.

Number one, emotional connection. The patient has to feel like you really care, like they should come to your office, like they're going to find an answer or a solution, a value at the practice. No patient picks up the phone not wanting an answer to something. They wouldn't have called if they didn't want something. You have to do more than just answer questions, you have to create emotional connection.

The second thing, you have to focus on discovery. I love the word discovery. You should hang it up around the office. Discover. Discover. Discover. What your patient wants, what motivates your patient, what their priorities are, what they're interested in, what their problems are, what their concerns are. You have to discover. You have to be on an expedition all the time. Again, you can hear what I'm telling you right now, this goes for every part of the practice. Every part. An emotional connection, discovery.

The next thing of course, to the phone call, what you want is a committed appointment. I always say, if you answer the phone every single day. You talk to every single patient. You know in your gut whether it's a good call or not. You know in gut if they're going to show for their appointment or not. We just pretend. We're just overly optimistic that everything is just

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going to go our way. You should assume, but you also need to have what they accurate thinking. The Great Napoleon Hill said, "Accurate thinking." You know on the phone if this person is scheduling a committed appointment. Now, there are ways to evolve. There are ways to evolve into getting a committed appointment by actually getting a credit card or making a deposit over the phone, but also, if you have emotional connection and discovery on the call, the patient is much more apt to set a committed appointment.

Committed means they're going to show up. Anybody can give you a time of day they're going to write it down in their calendar. Doesn't mean that they intrinsically going to feel compelled to show up and honor their words that they just gave you. You want to find out on this call why they're calling. Why now? What their problem is, dig dip into their problem and find out what they want to accomplish during their first visit. You want to know where they live, where they work and if they're married, all the context of the conversation. Not some robotic checklist like script.

Second, I want you to remember the way to make someone feel like you care about these five things, is how you do it.

Number one, you actually care. That's pretty obvious. Number two, you have to listen intently. So intently, you have to be very focused in a pin ball like practice, with stuff flying around all over the place, patient coming up, team member coming up, insurance on the phone.

You have to understand, people can feel and tell this. You need to make sure that you listen intently. You want to ask questions. You never answer questions. You ask questions. That's the magic of the entire thing. **Patient has any questions, you restate and you ask them a question.**

Now, once the patient answers, if you want them to feel like you care, you must restate their answers. A patient says, "I've been in a lot of pain." You say, "Oh my goodness, I understand that you're in a lot of pain. Let me help! Could you please tell me more about this pain?" The patient says, "Well, it's just my tooth is very sore." I'm very sorry to hear your tooth is so sore. Would you please tell me which tooth? How long has that been going on for you? You see, ask the question, flip it back.

Now, let's say the patient is asking about the price. How much is something? You all know this, I gave it to you so many long times ago. You say, "You know, patient, I really appreciate the question you're asking about. I'm just curious if you would please describe to me what exactly you're interested in when it comes to crowns or the cleaning or the implant. Okay? Because of course, there's so many different options that we have because we provide a customize care to all of our patients and that means that once we look inside your mouth, we're going to have to make recommendations, what's best for you. Then and only then, would I be able to give you an accurate investment that is going to be required for what you're asking about."

You don't say that whole thing, you just ask the question in reverse. You wait. You be quiet and you let the patient respond. You have to make sure it's very important.

If they say, "I just called to see what insurance you take." You say, "I'm so happy you did though. Of course, we maximize all insurance that are possible. May I please ask who I'm

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speaking with right now?” Then, you get their name and you carry on your guidelines or your script of the conversation. So important. Restate their answers that they give you so they know you’re listening.

Now, you have to make them feel important, like they’re the only one there is that you’re talking too. You do that by listening, by restating the questions and by asking them about themselves. It’s so important. Everything I’m giving you here, it solves all your problems if you follow what I’m saying, the right outcome will be had.

The third step to have a successful outcome on the phone, this is what you want:

1. You want the patient to know that you can help and have confidence in their first experience being something that is going to benefit them in some way. This is what must occur.
2. You want to take control immediately and be the person who asks the questions and once you get responses, you ask more questions to diving deeper into the conversation, getting them to the real root of what is going to motivate the caller.
3. You have to be interested, curious, genuine and not in a rush. Not in a rush. You want to stay focused, smile, which you know and use expression in your voice. It is so important to use expression in your voice.

Now, I’ve already given you some examples through out this time as I’m going through this Practice Focus. I’ll just give you a couple others.

You give patient confidence by them telling you they have problem. You say, “Let me tell you something, I totally understand. I hear patients say this every single day. Let me just assure you, it’s going to be all right. When you come here, we’re going to take care of you. By the way, you’re going to learn about what’s going on in your mouth so we can prevent any of these problems from happening ever again in the future.”

You may have somebody call and say, “I’ve been to the dentist many, many times but I still have this problem,” or, “I’m calling for second opinions.” “You know, I totally respect that. I’m honored that you called to our practice today. I’m going to tell you something right now, that after you experience our team, our doctor and we get to know you, personally develop a great relationship, you’re going to be so happy. You’re going to know that you found the right dental home. Now, the only way to do that of course is to come in and give us a try. Allow yourself to experience what we have to offer and provide for you.”

Now again, you’re using these in certain areas. I’m just explaining to you how to go above and beyond. You don’t have, again, robotics, militaristic, impersonal, unfriendly ... You don’t have those kind of calls. You can’t. You have to make them alive and exciting. You can tell, obviously, I use expression all the time.

If somebody says, “I’m in a lot of pain.” I say, “My goodness. I’m so sorry to hear this. Please tell me about this pain.” You don’t say, “Okay, what was your name again? All right. When is the last time you went to the dentist? Okay. Will you be using insurance?” Oh my goodness, come on. That’s so stupid. You don’t ask these kind of dumb questions. You make your

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person feel like a number, like you're punching buttons, like you're going down a script. Oh wait, you probably are.

You have to take control and guide the conversation, but you need to be real. You need to be real. I already explained about taking control. Any person asks any question at all, you always go back to, "I'm so happy you called today. May I please ask who I'm speaking with? Ms. Jones, thank you so much for calling. I'm so happy you called and let me tell you something, Ms. Jones, I'm going to help you today. Would you please tell me what motivated you to call?" Then, they go into the conversation. They say, "Well, this and that." They totally forgot about their stupid little questions.

I tell you this all the time, remember, patients only know to ask about three things: cleanings, prices, insurance.

What else is there in a patient's mind? They may have a painful problem in their mouth, which you won't know it unless you ask. Now, people calling up that have a problem, well that's great. They're making it easy for you but you must keep control.

Hey, your assignment is simple, very simple. You are going to roleplay effective phone calls that lead to great patient appointments. In doing so, you will be tested by tough questions that are asked and you must redirect or follow the verbiage I taught you at the champions training on how to overcome things like price, insurance cleaning among many, many other things.

You all should have decided on specific answers as a team that will always be used, so that everyone is on the same page. You should revisit your screen process and appreciate scheduling from various types of patients when, where, with whom and how long. You want to figure out the appropriate methods for all of this if you're still having challenges.

Remember to add the question for a suggestion about bringing someone with them on their first visit. Make sure you set up the patient concierge, or treatment coordinator properly on the call and everyone in the office should know what the next steps are. Email, video, text message, paperwork, welcome package, pre-appointed phone call, so on and so forth. This is a time to revisit, refocus, to refine your intake process.

Once again, the numbers speak for themselves. You know the number of phone calls you get, the number of appointments that are scheduled on those calls, the number of appointments that show up in the office, the number of patients who show up who move forward with treatment. All of those things I just said are all directly impacted by the phone call. If you think case acceptance is just about what happens in the operator, you're wrong.

Every person in the practice is impacted by the phone. You're going to help each other get better. Please, do take turns roleplaying with someone you do not usually work side by side with during the day and then switch it around. Give honest feedback and help each other improve. In doing all of this, look for breakthroughs and insights on places you might be messing up now or losing opportunity or chasing off patients or setting the wrong expectations or anything else.

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Done right, there ought to be some amazing magic and synergy in this exercise to really elevate everyone's level of control, emotional connection and influence over patients on the phone and otherwise.

Please, send me your toughest challenges, especially your changes, decisions, improvements and breakthroughs from doing this. Remember, you have unlimited resources available at www.DentalSuccessTodayOnline.com for refreshers, video scripts and other reviews. I strongly encourage this. Of course, you have access to myself and Kevin and all of our team.

Someone take the lead and let's get working together to get more qualified patients off the phone, into the office with a committed appointment they're excited about and looking forward to.

Doctors: pay close attention. You don't really know what's being said or questions you may wish to be handled differently. By the way, maybe, you're going to learn some things from the way your team has to engage with these patients in the crazy conversations that they have to have. Everybody make this successful.

Here's the thing, never forget, the battle for case acceptance is won before it ever begins if you do it right.

Next month, we'll move on to the next stage and phase of the patient engagement and experience in your practice. Go get them and remember, mastery, nothing less than we accept.